

Abstract

A group trading software application and method for remotely based investment managers providing the capability for managing multiple investment accounts by user defined groups. The groups can contain multiple investment and subgroups, each of which can be defined by the user around such criteria as on an ad hoc basis, on common levels of risk and by groups of owners. Multiple trading day fund cut off times for each group or subgroup are supported. Pending and complete trade status for each individual account, groups and/or subgroup is provided. The investments can be in any financial product, including annuities, mutual funds and insurance policies.